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Electronic Document Retention

Mainframe electronic mail at Philip Morris USA consists of two components: the Distributed Office Support System (DISOSS) and Personal Services/CICS (PS/CICS or "E-MAIL"). The E-MAIL system is used to create and send documents to other E-MAIL users or to users at one of the other Philip Morris Companies' electronic mail systems. Available for each user of the E-MAIL system are an In-Basket, where received documents are stored, and a File Cabinet, where documents created and sent to others are stored.

DISOSS acts primarily as a post office and routes mail from one electronic mail system to the other. It currently provides connectivity to the E-MAIL system, the DEC All-In-One systems, PC-based systems, and the twenty world-wide KGF and PMI PROFS systems. In addition to its post office functions, DISOSS also can be used by E-MAIL users to store documents. Although many documents are transitory in nature and are stored only for thirty days, some documents, such as forms, can have a retention of up to thirty years.

In order to provide full system recovery of the DISOSS and E-MAIL documents, regularly scheduled daily and weekly backups of the documents are taken. The backup data are retained for thirty days. Using the backup data, it would be possible with considerable effort to restore a deleted document.

Document retention policies for DISOSS were established and have been in place since the early 1980's. Documents stored in DISOSS are deleted on a monthly basis if their retention, based on how they were originally stored, has expired. However, there is no official document retention policy for documents stored in an E-MAIL user's In-Basket or File Cabinet. It is the responsibility of each E-MAIL user to periodically delete old documents from his In-Basket and File Cabinet.

Due to the growth of the number of E-MAIL documents retained over the years, electronic document retention policies are currently under reevaluation. At present, over 225,000 documents are stored in the E-MAIL users' In-Baskets and File Cabinets. The traditional method of dealing with the growth rate has been to provide more electronic storage space for the documents. Under consideration is an approach that will provide the ability to delete documents that have been aged beyond predetermined dates based on user, creation date, and/or document type. This approach will not only provide considerable electronic storage savings, but it will also enhance the ability to recover a document that has been either intentionally or inadvertently deleted. The length of the retention period for the document backups using the approach under study will be determined based on the business requirements of the users.

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